L.1.0 GENERAL INSTRUCTIONS

L.1.1 GENERAL INFORMATION

L.1.1.1 Points of Contact

The Contract Specialist (CS) is the primary point of contact for this acquisition.

The CS for this acquisition is as follows:
Jocelyn Fritz
Defense Threat Reduction Agency
Contracts Department, AL-ACN
Phone: Will be provided at time of award
Email: dtra.belvoir.ob.mbx.ob-bp-acquisitions@mail.mil

The Contracting Officer (KO) for this acquisition is as follows:
Eric Rode
Defense Threat Reduction Agency
Contracts Department, AL-ACN
Phone: Will be provided at time of award
Email: dtra.belvoir.ob.mbx.ob-bp-acquisitions@mail.mil

All questions, concerns, or requests for clarification regarding this solicitation shall be submitted electronically to dtra.belvoir.ob.mbx.ob-bp-acquisitions@mail.mil later than ENTER DATE, no phone calls are permitted. No comments, questions, or inquiries shall be made of any Government person other than the points of contact listed above. Questions received after this date and time may not be responded to by the Government. All emails shall be clearly labeled in the subject line with "Questions Concerning HDTRA1-25-R-0017." Offerors shall clearly identify the specific section of the solicitation to which each question relates when submitting questions. Reference should be made to the solicitation Section Heading, page number of the solicitation, and specific location on the page (e.g. third paragraph) in order to facilitate the Government's response to each question. Questions shall be submitted in a Microsoft Excel file following a format similar to the table below:

Question Number	Reference	Question Category	Question
#	Solicitation or Attachment and Section	Contract or Technical	Question

Responses to submitted questions will be provided to all Offerors via SAM at https://www.sam.gov. If amendments to the solicitation are issued, all Offerors must acknowledge the amendments by signing the accompanying Standard Form (SF) 30 and returning the signed SF 30 for all amendments issued with the Offeror's proposal submission. Failure to acknowledge all amendments issued by the Government may result in the proposal submitted in response to the solicitation being found non-responsive by the Government.

L.1.1.2 Debriefings

L.1.1.2.1 Pre-award Debriefings

Offerors excluded from the competitive range or otherwise excluded from the competition before award may request a debriefing by submitting a written request to the KO within three (3) calendar days after receipt of the notice of exclusion from the competition. The Government shall make every effort to

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debrief unsuccessful Offerors as soon as practicable. Refer to FAR 15.505 for further instructions.

L.1.1.2.2 Post-award Debriefings

Offerors may request a debriefing by providing a written request to the KO. The KO will notify Offerors of the source selection decision within three (3) calendar days after award. Offerors that desire a debriefing must request one in writing within three (3) calendar days after receipt of the KO notification. To the maximum extent practicable, debriefings will be conducted within five (5) calendar days after the Offeror's request.

L.1.1.3 Discrepancies

If an Offeror believes the solicitation, including the instructions to Offerors, contains errors, omissions, or ambiguities, or are otherwise unsound, the Offeror shall immediately notify the Contract Specialist and Contracting Officer in writing with supporting rationale at any point prior to the proposal submission deadline.

L.1.2 ORGANIZATION/DISTRIBUTION/NUMBER OF COPIES/PAGE LIMITS

The Offeror shall prepare the proposal as set forth in the Proposal Organization Table 1.2 below. The titles and contents of the volumes, as well as the page limitations and number of required copies shall be as specified in the table. In the event that the table conflicts with the detailed instructions in the paragraphs that follow, the detailed instructions shall take precedence.

Volume	Volume Title	Copies	Page Limit
I	Proposal Documentation	1 – Electronic	Unlimited
II	Factor 1 – Mission Capability	1 – Electronic	
	• Subfactor A – Management Approach		30
	○ Key Personnel Resumes		
	○ Foreign National Identification Form		
	• Subfactor B – Technical Approach		20
	• Subfactor C – Sample Tasks		
	• Sample Task Order 1 ▪ Procurement, Training, and Logistics		40
	• Sample Task Order 2 ▪ Facility		30
III	Factor 2 – Past Performance	1 – Electronic	
	• Description		5
	• Present and Past Performance Information Form		3 pages per reference
	• Organizational Change History		Unlimited
IV	Factor 3 – Socioeconomic Utilization	1 – Electronic	
	• Subfactor A – Small Business Participation		5
	• Subfactor B – Small Business Subcontracting Past Performance		Unlimited
V	Factor 4 – Cost	1 – Electronic	
	• Cost Narrative		75
	• Cost Proposal		Unlimited

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a. The "ORIGINAL" copy of Volumes I, II, III, IV, and V of the proposal shall be provided electronically via the Procurement Integrated Enterprise Environment (PIEE) Solicitation module under the instructions contained in this solicitation and accessed at https//piee.eb.mil (in the event of conflict, the instructions on the website take precedence). Each volume shall have a coversheet, clearly marked as volume number, Offeror's name, solicitation number, and proposal date.

b. The electronic copy of each volume shall be submitted in accordance with Paragraph L.1.3.7

c. Present and Past Performance Questionnaires (Attachment L-2) shall be emailed in PDF to the team email address, dtra.belvoir.ob.mbx.ob-bp-acquisitions@mail.mil

d. Please note the requirements for submission of proposals contained in FAR 52.215-1 (incorporated by reference as described earlier)

L.1.3 PROPOSAL FORMAT

L.1.3.1 Guidance

This section of the Information to Offerors (ITO) provides general guidance for preparing proposals as well as specific instructions on the format and content of the proposal. The Offeror's proposal must include all data and information requested by the ITO and must be submitted in accordance with these instructions. Non-compliance with the instructions provided in the ITO may result in an unfavorable proposal evaluation.

L.1.3.2 Sufficient Detail

Proposals shall comply with the following guidelines:

- Be complete and respond directly to the requirements of the solicitation.
- Address the factors, subfactors, and their related elements as listed in Section M of the solicitation.
- Be clear, concise, and include sufficient detail for effective evaluation and for substantiating the validity of stated assertions. Extraneous, repetitious, or wordy submissions are not desired and could result in lower ratings.
- Do not simply rephrase or restate the Government's requirements, but rather provide convincing rationale to address how the Offeror intends to meet the requirements.
- Assume that the Government has no prior knowledge of the Offeror's capabilities and experience and will base its evaluation only on the information presented in the Offeror's proposal.

L.1.3.3 Validity Statement

The Offeror is requested to complete the proposal validity date in block 12, Section A of the solicitation, with not less than 180 days. In addition, the Offeror shall make a clear statement that the proposal is valid for the duration of the acceptance period (the "acceptance period" is the same as the 180-day period). In accordance with FAR Subpart 4.8 (Government Contract Files), the Government will retain one copy of all unsuccessful proposals. Unless the Offeror requests otherwise, the Government will destroy extra copies of unsuccessful proposals.

L.1.3.4 Physical Appearance of Submissions

- Elaborate brochures or documentation, detailed artwork, or other embellishments are unnecessary

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and are not desired.
- Proposals shall be submitted in electronic format.
- No models, mockups, or videos will be accepted.

L.1.3.5 Page Format Restrictions and Limitations

L.1.3.5.1 Page Size

Pages shall be 8.5 x 11 inches, not including foldouts. The Government will only accept 11x17 foldout sheets for tables, charts, and graphs (landscape orientation only). Except for the lettering that is within a graphic, the font size shall be no less than ten (10) point. Lettering within tables, charts, graphs, footnotes, and figures shall be no smaller than eight (8) point. Margins on all four edges of each sheet shall be at least one-inch. Proprietary statements, security markings, and page numbers may be placed within the defined margin area. Pages shall be numbered sequentially by volume. In the event discussions are held, these page format restrictions shall also apply to the Final Proposal Revisions (FPRs).

L.1.3.5.2 Page Limitations
Page limitations shall be treated as maximums. If exceeded, the excess pages will not be read or considered in the evaluation of the proposal. The excess pages will be deleted from the electronic proposal. In the event discussions are held, page limitations may be placed on responses to Evaluation Notices (ENs). Page limits, if specified for EN responses, will be identified in the letters forwarding the ENs to the Offerors.

L.1.3.5.3 Pages Counted
Each page shall be counted except the following:
- Past performance questionnaires (Attachment L-2)
- Cover pages (excludes those for sample task orders as well)
- RFP cross-reference matrix
- Teaming agreements
- Letters of commitment for key personnel (1 page per letter of commitment)
- Past performance consent letters
- Client authorization letters
- Tables of contents
- Revision matrix
- Small Business Subcontracting Plan
- OCI Mitigation Plan
- Glossary of abbreviations and acronyms
- Lists of figures, tables, or drawings
- Blank pages
- Key personnel resumes (2 pages per resume)
- Socio-Economic Commitment Calculation Template (Attachment L-3)
- Past Performance Roadmaps (reference L.4.4)

L.1.3.6 Indexing

Each volume shall contain a more detailed table of contents to delineate the sections within that volume.

L.1.3.7 Electronic Delivery

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a. Offerors shall submit their proposals electronically via the Procurement Integrated Enterprise Environment (PIEE) Solicitation Module (https://piee.eb.mil.) under the instructions contained in this solicitation and accessed at: https://piee.eb.mil. Proposals shall be submitted electronically via the PIEE Solicitation Module only. Hard copy submissions or any other submission outside the PIEE system will not be accepted. The Government does not anticipate a requirement for submission of classified materials.

b. The electronic submission shall govern for the purpose of submission, modification, and withdrawal of proposals as addressed in FAR 52.215-1 "Instructions to Offerors-Competitive Acquisition" (included by reference in this solicitation); this paragraph supplements that coverage. Offerors are responsible for submitting proposals and any proposal modifications/revisions by the date and time specified in the solicitation. Proposals submitted electronically will be considered "late" unless the Offeror completes the entire transmission of the proposal prior to the closing date and time established for receipt of proposals under this solicitation. Proposal transmission must therefore be completed no later than INSERT DATE. Proposals received after this exact time will NOT be considered unless it meets one of the exceptions stated in Federal Acquisitions Regulation (FAR)52.215-1(c)(3).

c. Each electronic file shall be clearly named for the Mission Pool being proposed to as well as the Proposal Volume contained within the file.

d. Electronic proposal files shall not contain classified data. The Offeror's e-proposals shall be in accordance with the requirements set forth below:

- Portable document file (pdf) files shall be created using Adobe Acrobat 2017 (or earlier compatible).
- Excel files shall be created using Microsoft Excel 2016 (or earlier compatible)*
- Personally Identifiable Information (PII) is considered Controlled Unclassified Information which the Solicitation Module supports (as long as the PII is embedded in the documents).

*All cost information, with the exception of the cost narrative, must lend itself to review and analysis by the Government and must be submitted in Microsoft Excel format. Offerors shall include formulas and working links (within the workbook), and refrain from hidden columns and field protection (lock), to the maximum extent practicable.

Note: The electronic copy shall be in Adobe Acrobat (except for Microsoft Excel) portable document file (pdf) searchable text format.

e. Electronic files shall be clearly identified for each volume, section, item, etc. The Offeror shall not embed sound or video (e.g., MPEG) files into the proposal files.

f. Electronic Media additional information:

- All text must be searchable
- Keep embedded graphics as simple as possible; large graphic files are discouraged
- Minimize the use of scanned images (except for Adobe Acrobat requirements)
- The solicitation portal (PIEE) does not support the use of self-extracting archive files (e.g., ZIP files), therefore this type of file may not be used and multiple files may be uploaded instead

g. In the event proposed subcontractors desire to submit discrete, substantiating rate and pricing data directly to the Government based on the existence of proprietary data, subcontractors may submit their substantiating rate and pricing data directly to the Contracting Officer via email at dtra.belvoir.ob.mbx.ob-bp-acquisitions@mail.mil. Any subcontractor submissions are required by the due date listed at L.1.1.1, Late submissions will be found to be non-compliant and will not be evaluated.

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h. The Government reserves the right to print digital submissions for the purposes of evaluation.

L.1.3.8 Cost Information

All cost information (with the exception of the risk quantitative estimates on cost outlined in Table 3.3.3: Proposal Risk Matrix, in L.3.3.3 and the items required in L.5.2) shall be addressed ONLY in the Cost Volume (Volume V). All labor rates shall be rounded to the nearest penny. Items such as labor rates or unit rates (e.g., unit rates for material) shall be rounded to the nearest penny. All cost information, with the exception of the cost narrative, must lend itself to review and analysis by the Government and must be submitted in Microsoft Excel format. Offerors shall include formulas and working links to the maximum extent practicable. All cost information shall be rounded to two decimal points.

L.1.3.9 Volume Designation

Information required for proposal evaluation that is not found in its designated volume will be assumed to have been omitted from the proposal. Each volume shall be written on a stand-alone basis so that its contents may be evaluated without cross-referencing to other volumes of the proposal. Exceptions to the above include only teaming agreements, letters of commitment, socio-economic commitment information which must be submitted in Volume I and Volume IV but may be cross-referenced in other volumes, and what is required by L.6.3.1.

L.1.3.10 Glossary of Abbreviations and Acronyms

Each volume shall contain a glossary of all abbreviations and acronyms used, with an explanation for each. Glossaries do not count against the page limitations for their respective volumes.

L.2.0 VOLUME I – PROPOSAL DOCUMENTS

Volume I consists of the offer to enter into a contract to perform the desired work and information for the Government to prepare the contract document and supporting file.

L.2.1 VOLUME ORGANIZATION

Volume I shall be organized according to the following outline:

a. Table of Contents
b. List of Tables and Drawings
c. Glossary
d. Documents listed in Paragraphs L.2.2 through L.2.13

L.2.2 SOLICITATION/CONTRACT FORM

Completion of Blocks 12 through 16 and signature and date for Blocks 17 and 18 of the Standard Form (SF) 33 is required. Signature by the Offeror on the SF 33 constitutes an offer, which the Government may accept.

L.2.3 AUTHORIZED OFFEROR PERSONNEL

Provide the name, title, telephone number, and e-mail address of the company and division point of contact regarding decisions made with respect to the Offeror's proposal and who can obligate the Offeror

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contractually. Also identify those individuals authorized to negotiate with the Government.

L.2.4 GOVERNMENT OFFICES

Provide the mailing address, telephone numbers, and facility codes for the cognizant Contract Administration Office, Defense Contract Audit Agency (DCAA), Defense Contract Management Agency (DCMA) and Government Paying Office (the Paying Office is only required for the Prime Offeror). Also provide the name, telephone number, and e-mail address for the Administrative Contracting Officer (ACO). The aforementioned information applies to the prime contractor and all proposed team members. Note: the facility code refers to the organizational entity code for the facility in which the work will be performed. If the work for the task order is to be performed at an address different from that represented by the contractor's code, and any contract administration function will be required at that facility, then the facility code is required.

L.2.5 COMPANY DIVISION ADDRESS, IDENTIFYING CODES AND APPLICABLE DESIGNATIONS

Provide the company's/division's street address, county, and facility code; CAGE Code; Unique Entity Identifier (UEI) number; Taxpayer Identification Number (TIN); size of business (large or small); and labor surplus area designation. This requirement also applies to all proposed team members.

L.2.6 TEAMING AGREEMENTS AND/OR LETTERS OF COMMITMENT

In accordance with FAR 9.6, a contractor team arrangement is defined when two or more companies form a partnership or joint venture to act as a potential prime contractor; or a potential prime contractor agrees with one or more other companies to have them act as its subcontractors under a specified Government contract or acquisition program.

Provide either Teaming Agreements or Letters of Commitment from first-tier subcontractor(s) in Volume I. This information is required for all proposed team members. The Government will consider the Offeror and first-tier subcontractor(s) as a whole "Team" when a signed Teaming Agreement or Letter(s) of Commitment is submitted with the proposal. In the absence of these documents, the Offeror and its first-tier subcontractor(s) will not be considered a "Team" and will not be evaluated as such.

Offerors that submit a proposal as a Joint Venture shall provide full and complete information on each of the participating members/companies, as well as the proposed organization itself. The Offeror shall describe whether or not the Joint Venture will be populated or unpopulated. The Offeror shall provide a complete copy of the agreement(s) that describe(s) the business arrangement between the entities, including its corporate governance construct that will be utilized to effectively manage and accomplish the work required by this contract.

L.2.7 DEPARTMENT OF DEFENSE (DD) FORM 254 SECURITY REQUIREMENTS

The Offeror must possess, or acquire prior to award of a contract, a facility clearance equal to the highest classification stated on the Contract Security Classification Specification (DD Form 254) provided as Attachment 2 to this Request for Proposal (RFP). Provide information relative to Offeror's facility clearance and the contact information for the Offeror's security office. Information relative to subcontractor security requirements shall also be included. Completion of the contractor information blocks on the DD-254 (Section J, Attachment 2) is required. All team members must be included at the IDIQ level. Offerors who do not currently possess a facility clearance equal to the highest classification

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stated on the DD Form 254 shall demonstrate how they will obtain clearance prior to IDIQ award.

L.2.8 INFORMATION REQUIRED BY DFARS CLAUSE 252.227-7017 IDENTIFICATION AND ASSERTION OF USE, RELEASE, OR DISCLOSURE RESTRICTIONS (JAN 2011) AND DFARS CLAUSE 252.227-7028 TECHNICAL DATA OR COMPUTER SOFTWARE PREVIOUSLY DELIVERED TO THE GOVERNMENT (JUNE 1995)

If applicable, the Offeror shall include 252.227-7017 paragraph (d) chart, in full-text, filled-in/completed. The offeror shall also attach to its offer the information required by 252.227-7028, if applicable.

L.2.9 EXCEPTIONS TO TERMS AND CONDITIONS

Exceptions taken to the terms and conditions of the solicitation, or to any of its formal attachments, including the sample task, shall be identified. Each exception shall be specifically related to each paragraph and/or specific part of the solicitation to which the exception is taken. Provide rationale in support of the exception and fully explain its impact, if any, on the performance, schedule, cost/price, and specific requirements of the solicitation. This information shall be provided in the format and content of Table 2.9. Failure to comply with the terms and conditions of the solicitation may result in the Offeror being removed from consideration for award.

Table 2.9 – Solicitation Exceptions

Solicitation Document	Paragraph/Page	Requirement/Portion	Rationale
SOO, PWS, Solicitation Document, Attachment, etc.	Applicable Page and Paragraph Numbers	Identify the requirement or portion to which the exception is taken	Justify/explain the basis for the exception and impact on the contract

L.2.10 REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFEROR(S) (SECTIONS K AND L)

The Offeror is responsible to ensure that all representations, certifications, acknowledgements, and statements provided in accordance with Sections K and L are (i) provided in the System for Award Management (SAM) (https://www.sam.gov/portal/public/SAM/); and (ii) if not included in the SAM database, are completed and submitted with the Proposal Documentation volume.

L.2.11 PREAWARD ORGANIZATIONAL CONFLICTS OF INTEREST (OCIs) AND OCI MITIGATION PLAN

1) Organizational conflict of interest, as defined in FAR 2.101, means that because of other activities or relationships with other persons, a person is unable or potentially unable to render impartial assistance or advice to the Government, or the person's objectivity in performing the contract work is or might otherwise be impaired, or a person has an unfair competitive advantage. Offerors are directed to FAR Subpart 9.5 for detailed information concerning OCIs. Applying the principles of FAR Subpart 9.5, the Offeror shall assess whether there is an OCI associated with the offer it plans to submit, including any potential subcontracts.

2) Each Offeror must include in Volume I of its proposal either;

    a) a statement certifying that, to the best of its knowledge, it is not aware of any facts which create any actual or potential OCIs relating to the award of this contract, or

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b) a submission that discloses all relevant information concerning any past, present, or planned interest (financial, contractual, organizational, or otherwise) relating to the work to be performed under the proposed contract and bearing on whether the Offeror has an actual or potential OCI. For financial interests, the statement must describe the nature and extent of the interest and any entity or entities involved in the financial relationship.

3) Regardless of whether the offeror perceives there is an OCI or not, each Offeror shall provide a list of active DTRA contracts and orders (and DTRA-funded contracts/orders awarded by a non-DTRA activity) performed by the offeror either as a prime, subcontractor, or consultant (and contracts/orders completed within the last two years). The offeror also shall provide a list of active DTRA contracts and orders (and DTRA-funded contracts/orders awarded by a non-DTRA activity) held by any proposed subcontractors or joint venture partners (and those completed within the last two years). The lists must identify: (i) the prime contract number; (ii) the name of the prime contractor (if the offeror/proposed subcontractor/joint venture partner is/was a subcontractor or consultant for the effort); (iii) the period of performance; (iv) the DTRA directorate/branch responsible for program management of the contract/order; and (v) a description of the services performed and/or supplied provided.

4) The Offeror represents, by submission of its offer, that to the best of its knowledge and belief it has disclosed all relevant information regarding any organizational conflicts of interest as required in paragraph b of this provision.

5) The Offeror shall explain the actions it intends to use to mitigate the actual or potential OCIs identified pursuant to paragraph b(2) above by submitting an OCI mitigation plan. The OCI mitigation plan elements should include (but are not limited to) the following:
   - Definition of terms used
   - Organizational, physical and financial separation, as appropriate (such as corporate firewalls for business units, etc.)
   - Corporate processes for identification, review and adjudication of OCIs
   - Mitigation approaches for actual and/or potential OCIs
   - Access to, use and protection of government sensitive and proprietary information (hardcopy and electronic, including electronic firewalls)
   - Reporting and remedies for accidental and intentional OCIs.

6) OCI disclosures and the OCI mitigation plan will be addressed during the evaluation of proposals, but OCI will not be treated like a separate evaluation factor. The Contracting Officer will use all information submitted by the Offeror, and any other relevant information known to DTRA, to determine whether an actual or potential conflict exists. If the Contracting Officer determines that an actual or potential conflict exists, the conflict must be avoided or otherwise resolved through appropriate means in order for the Offeror to be eligible for award.

L.2.13 REVISION MATRIX

If it is determined to be in the best interest of the Government to hold discussions and Final Proposal Revisions (FPRs) are submitted, the contractor shall submit a revision matrix after the table of contents in each volume where revisions have been made. This matrix must include the following:

- Location of change: At a minimum the page number, but more specific indicators (section, paragraph, etc.) are strongly encouraged
- Change: A very brief summary of what changed

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L.3.0 VOLUME II Factor 1 – Mission Capability

L.3.1 GENERAL

The Mission Capability Volume shall describe the Offeror's capability to satisfy the requirements of the IDIQ Statement of Objectives (SOO) and sample Task Order Performance Work Statement (PWS). The proposal should be prepared simply and economically, providing straightforward, concise delineation of the management approach and technical capabilities to satisfactorily perform the contract being sought. Particular proposal strengths or unique approaches should be emphasized. Asserted capability and/or intent to meet the requirements must be supported by detailed descriptions of approach and personnel qualifications. The Government will not assume that an Offeror possesses any capability unless it is supported by the proposal.

Offeror responses will be evaluated against the Mission Capability subfactors and their related elements defined in Paragraph M.2.2, Factor 1- Mission Capability. Offerors shall provide, as specifically as possible, the actual methodology that would be used by the Offeror for accomplishing and satisfying these subfactors. All the requirements specified in the solicitation are mandatory. By submitting a proposal, the Offeror is representing that its firm is capable and committed to performing all the requirements specified in the solicitation. Offerors are cautioned that "parroting" of the Mission Capability requirements (described below), the IDIQ SOO, or the Task Order's PWS with a statement of intent to perform does not reflect understanding of the requirement or capability to perform. The Offeror should provide, as specifically as possible, the actual methodology for accomplishing and satisfying the requirements. By submitting a proposal, the Offeror is representing that its firm is capable and committed to performing all the requirements specified in the solicitation.

L.3.2 VOLUME ORGANIZATION

Volume II shall be organized according to the following outline:

a) Table of Contents
b) List of Tables and Drawings
c) Glossary
d) RFP Cross-Reference Matrix
e) Subfactor A: Management Approach
f) Subfactor B: Technical Approach
g) Subfactor C: Sample Task Order

L.3.3 FORMAT AND SPECIFIC CONTENT

Mission Capability shall describe, in narrative form, the Offeror's proposed approach to meeting the requirements of each Mission Capability subfactor and their related elements, as well as their intended strategy for fulfilling the requirements of the contract. The Offeror shall ensure the proposal includes the mission capabilities of their team members and other intended subcontractors. The proposed teaming structure, team member roles and responsibilities, experience working as a team, and anticipated portion (by percentage, type of work, geographical, etc.) of work effort for each team member should be discussed and clearly delineated as required within the subsections that follow.

L.3.3.1 RFP Cross-Reference Matrix (RCRM)

The Offeror shall fill out an RCRM indicating where the proposal addresses the solicitation requirements. An example format is shown below in Table 3.3.1. The purpose of the RCRM is to show critical

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interrelationships and dependencies among the documents. The matrix ensures that all requirements are addressed, requirements do not conflict, and proposal sections are internally consistent. This matrix only applies to Volume II.

Table 3.3.1 – Example RCRM Format

RFP CROSS REFERENCE MATRIX	
Solicitation Section/Paragraph	Proposal Volume/Section/Paragraph
L3.3.2 Subfactor A: Management Approach	*Volume II/Subfactor A*

L.3.3.2 Subfactor A: Management Approach

The Offeror shall submit a comprehensive management approach for managing the IDIQ SOO. The management approach shall discuss how the Offeror will provide for maximum flexibility to innovatively and cost-effectively manage the program schedule, performance, risks, subcontracts, and data to support the program objectives. The Management Approach shall include the following:

- Team Composition and Management:
    - Describe a process to assemble and manage a highly qualified and responsive team (e.g. large businesses, small businesses, and universities, as appropriate) with relevant expertise to meet requirements.
    - Identify and assign a Program Management (PM) team with relevant experience and expertise, to be responsible for the overall management of the IDIQ.
    - Describe the approach to recruit, retain, and replace personnel (i.e. the proper experience, expertise, and security clearances in a timely manner)
    - Describe a process to rapidly assemble a team to meet emerging threats and requirements as needed.
- Problem Solving and Communication Methods
    - Describe methods for solving management problems and incorporating lessons learned
    - Describe effective and consistent means to communicate issues, implement corrective actions, and submit standard reports to the Government
- Program Execution
    - Describe the means for providing clear visibility into the program's schedule, performance, and risk
    - Describe the employment of sound methodologies to manage cost and a strong commitment to cost savings
    - Describe a process to identify, assess, mitigate, monitor, and report project and program risk
    - Provide a detailed plan showcasing the capability to execute multiple TOs simultaneously and respond to urgent requirements.

L.3.3.2 Subfactor B: Technical Approach

The Offeror shall provide a detailed description of its technical approach to effectively perform the tasks specified in the SOO. The Offeror shall submit writeups that include:

- The Offeror shall provide a detailed description of its approach to effectively and efficiently perform the tasks specified in the SOO, including a transition plan that quickly mobilizes

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personnel and establishes processes to maximize performance time.

- The Offeror shall identify project risks, including cost projection and control, supply chain and delivery, instructor quality, and emerging requirements, and provide impacts and mitigation measures for each.
- The Offeror shall detail an effective staffing plan composed of qualified personnel to oversee and execute tasks as required by the SOO. The Offeror shall include a staffing plan that specifies labor categories, quantity of labor hours or full time equivalent (FTE) personnel by labor category, role or responsibilities of each proposed personnel, the skill level or qualifications of the proposed personnel, and the personnel's employment arrangement (e.g., prime, sub-contractor, etc.). The Offeror shall identify personnel who are Key Personnel and provide resumes and letters of commitment for key personnel. Resumes shall contain the following information:
    - Full name,
    - Proposed Position Title/Labor Category,
    - Clearance status, and
    - Summary of Professional Experience: A narrative of the skill sets they possess to perform the functions outlined in the SOO requirement they are projected to support. Identify any relevant education, experience, training, etc. that makes this individual particularly suited for the proposed position and identify any benefits or advantages this individual brings to the Program. Include dates, job titles, and employer.

  The Letters of Commitment shall contain the following information:
    - Date
    - Full name
    - Signature of employee/prospective employee, name of employer/prospective employer for this contract (name of contractor/subcontractor).
    - Identify if the person is a current employee or prospective/contingent hire employee.
    - Planned labor category/position person will perform in and whether full time or part time,
    - The length/duration of the commitment to perform under this task order.

L.3.3.3 Subfactor C: Sample Task Orders

The Offeror shall provide a detailed description of its technical approach to effectively perform the tasks specified in the specified Sample Task Order PWS.

L.3.3.3.a Sample Task Order 1: Fiscal Year 25 Requirements

- The Offeror shall provide a detailed description of its approach to effectively perform the tasks specified in the FY25 Training and Equipping PWS and the associated FY25 Pricing Assumptions. The Offeror shall include the following in the technical volume:
    - The Offeror shall provide a detailed description of its approach to effectively and efficiently perform the tasks specified in the PWS and Pricing Assumptions, including a transition plan that quickly mobilizes personnel and establishes processes to maximize performance time.
    - The Offeror shall identify project risks, including cost projection and control, supply

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chain and delivery, instructor quality, and provide impacts and mitigation measures for each.

- The Offeror shall detail an effective staffing plan composed of qualified personnel to oversee and execute tasks as required by the PWS and Pricing Assumptions. The Offeror shall include a staffing plan that specifies labor categories, quantity of labor hours or full time equivalent (FTE) personnel by labor category, role or responsibilities of each proposed personnel, the skill level or qualifications of the proposed personnel, and the personnel's employment arrangement (e.g., prime, sub-contractor, etc.). The Offeror shall identify personnel who are Key Personnel and provide resumes and letters of commitment for key personnel. Resumes shall contain the following information:
  - Full name,
  - Proposed Position Title/Labor Category,
  - Clearance status, and
  - Summary of Professional Experience: A narrative of the skill sets they possess to perform the functions outlined in the PWS requirement they are projected to support. Identify any relevant education, experience, training, etc. that makes this individual particularly suited for the proposed position and identify any benefits or advantages this individual brings to the Program. Include dates, job titles, and employer.

- The Letters of Commitment shall contain the following information:
  - Date
  - Full name
  - Signature of employee/prospective employee, name of employer/prospective employer for this contract (name of contractor/subcontractor).
  - Identify if the person is a current employee or prospective/contingent hire employee.
  - Planned labor category/position person will perform in and whether full time or part time,
  - The length/duration of the commitment to perform under this task order.

L.3.3.3.b Sample Task Order 2: Facility

- The Offeror shall provide a detailed description of its approach to effectively perform the tasks specified in the Facility PWS. The Offeror shall submit write ups that include:
  - The Offeror shall provide a detailed description of its approach to effectively and efficiently perform the tasks specified in the PWS, including a transition plan that quickly mobilized personnel and establishes processes to maximize performance time.
  - The Offeror shall identify project risks, including cost projection and control, supply chain and delivery, instructor quality, and provide impacts and mitigation measures for each.
  - The Offeror shall detail an effective staffing plan composed of qualified personnel to oversee and execute tasks as required by the PWS. The Offeror shall include a staffing plan that specifies labor categories, quantity of labor hours or full time equivalent (FTE) personnel by labor category, role or responsibilities of each proposed personnel, the skill level or qualifications of the proposed personnel, and the personnel's employment arrangement (e.g., prime, sub-contractor, etc.). The Offeror shall identify personnel who are Key Personnel and provide resumes and letters of commitment for key personnel. Resumes shall contain the following information:

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        - Full name,
        - Proposed Position Title/Labor Category,
        - Clearance status, and
        - Summary of Professional Experience: A narrative of the skill sets they possess to perform the functions outlined in the PWS requirement they are projected to support. Identify any relevant education, experience, training, etc. that makes this individual particularly suited for the proposed position and identify any benefits or advantages this individual brings to the Program. Include dates, job titles, and employer.

    - The Letters of Commitment shall contain the following information:
        - Date
        - Full name
        - Signature of employee/prospective employee, name of employer/prospective employer for this contract (name of contractor/subcontractor).
        - Identify if the person is a current employee or prospective/contingent hire employee.
        - Planned labor category/position person will perform in and whether full time or part time,
        - The length/duration of the commitment to perform under this task order.

L.4.0 VOLUME III - Past Performance

L.4.1 VOLUME ORGANIZATION

Volume III shall be organized according to the following outline:

a) Table of Contents
b) Glossary
c) Description of Team
d) Present and Past Performance References
e) Organizational Structure Change History

L.4.2 DESCRIPTION OF TEAM

The Offeror shall provide a matrix of all proposed subcontractors/team members/joint venture partners and the specific areas within the IDIQ SOO for which they will be utilized. In addition, the Offeror shall submit a consent letter executed by each subcontractor, teaming partner, and/or joint venture partner, authorizing release of adverse past performance information to the Offeror, so the Offeror can respond to such information. For each identified effort for a commercial customer, the Offeror shall also submit a client authorization letter, authorizing release to the Government of the requested information on the Offeror's performance.

L.4.3 PRESENT AND PAST PERFORMANCE REFERENCES

The Offeror shall describe previous experience with Building Partnerships. The Offeror shall identify a minimum of three (3) and no more than six (6) past performance references for the prime and subcontractors combined. If Offerors submit more than the allotted number of references, only the first six (6) references will be read. The references shall represent recent contracts (within the past five (5) years) that the Offeror considers most relevant in demonstrating the Offeror's ability to perform the proposed effort. References can be either Government or Commercial contracts.

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In addition to the information provided in Volume III, the Offeror shall ensure that each reference identified by the Offeror and its subcontractors/teaming partners (if applicable) completes a Present and Past Performance Questionnaire (PPPQ) (Attachment L-2). If a company or joint venture partner was a subcontractor to a prime contractor on a contract, then the responsible government oversight manager (or commercial equivalent) may complete the PPPQ instead of the prime contractor. This questionnaire shall be submitted directly to the Government from the reference; questionnaires received from the Offeror will not be considered. However, the responsibility to send out and track the completion of the PPPQs rests solely with the Offeror. Completed PPPQs shall be emailed in PDF to the Contracting Officer and Contract Specialist at the e-mail address shown in Paragraph L.1.1.1. PPPQs are due by the time and date indicated in Block 9 of the SF-33.

Additionally, for each of the projects identified, the Offeror shall provide a Past Performance Information Form (PPIF) (Attachment L-1) narrative describing the effort, the correlating scope area(s) of the PWS/relevance, and the results of the Offeror's performance. This narrative shall include rationale supporting the assertion of relevance.

L.4.4 ORGANIZATIONAL STRUCTURE CHANGE HISTORY

Many companies have acquired, been acquired by, or otherwise merged with other companies, and reorganized their divisions, business groups, subsidiary companies, etc. In many cases, these changes have taken place during the time of performance of relevant present or past efforts or between conclusion of recent past efforts and this source selection. As a result, it is sometimes difficult to determine what past performance is relevant to this acquisition. To facilitate this relevancy determination, include in this proposal volume a "roadmap" describing all such changes in the organization of the Offeror for the past five (5) years and also include a "roadmap" for all team members identified in a Teaming Arrangement or Letter of Commitment or joint venture for their efforts (if applicable). As part of this explanation, show how these changes impact the relevance of any efforts the Offeror identifies for past performance evaluation and performance confidence assessment (PCA). Since the Government intends to consider present and past performance information provided by other sources as well as that provided by the Offeror, these "roadmaps" should be both specifically applicable to the efforts the Offeror identifies and general enough to apply to efforts on which the Government receives information from other sources. These "roadmaps" will not count toward the page limitations of Volume III.

L.5.0 VOLUME IV – SOCIOECONOMIC UTILIZATION

L.5.1 VOLUME ORGANIZATION

Volume IV shall be organized according to the following outline:

a) Table of Contents
b) Glossary
c) Subfactor A: Small Business Participation
d) Subfactor B: Small Business Subcontracting Past Performance

L.5.2 SMALL BUSINESS PARTICIPATION (SUBFACTOR A)

DTRA is committed to maximizing small businesses opportunities at both the prime contractor and subcontractor level. All Offerors (large and small business) shall prepare a summary list of proposed subcontractors, which includes the following information: Company Name, CAGE Code, Size Status, Socio-Economic Status, Description of the Subcontracted Work, Subcontract Dollars, and Percentage of Total Contract Value proposed.

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DTRA will use the System for Award Management (SAM) website (https://www.sam.gov/portal/public/SAM/), which provides for registration and online representations and certification to verify proposed small business entities meet the size standard for the NAICS code of the subcontracted work and the socioeconomic categories in which they are counted. Note: The solicitation NAICS 541990 applies only to the prospective prime Offerors. Subcontractor team members should report the NAICS codes on their SAM entry which reflects their core business for which they will perform subcontracting work on this acquisition.

Offeror shall describe its approach and ability to team with small or disadvantaged companies to meet the 12% of Total Contract Value (TCV) to Small Business and the Socio-economic commitment goals in this solicitation (Use Attachment L-3 to document the proposed Socioeconomic Commitment, more information provided in L.5.2). For Socio-Economic Commitment evaluation purposes, the Total Contract Value proposed is considered to be the numerical sum of the Sample Task Order's total contract dollar value.

Offeror's proposal will be evaluated for commitment to small business, as evidenced by signed teaming agreements, Mentor-Protégé Agreements and/or letters of commitment; identifying the type of work and complexity of the work subcontracted; and percentage of total contract value subcontracted to small businesses in all socioeconomic categories.

Offerors may submit the 1st page (identifying the subcontractor or protégé) and signature page of teaming agreements, mentor-protégé agreements and/or letters of commitment as evidence of commitment to small businesses. These agreements and letters of commitment do not count in the page count. Teaming agreements shall be submitted as part of Volume I.

Offeror's socio-economic commitment also will be evaluated relative to meeting the Small Business and socioeconomic subcontracting requirement, based on total contract value, in the chart below.

Table 5.2 Socioeconomic Commitment Goals

Category	Percentage of Total Contract Value
Small Business (SB)	12%
Small Disadvantaged Business (SDB)	1%
Women Owned Small Business (WOSB)	1%
Veteran Owned Small Business (VOSB)	2%
Service Disabled Veteran Owned Small Business (SDVOSB)	2%
HubZone	0.4%

Small business prime contractors may include the cost of work self-performed toward meeting the 12% Small Business goal.

L.5.2.1 SMALL BUSINESS PARTICIPATION TEMPLATE

To ensure consistency in the calculation of Socioeconomic Commitment, a calculation template is provided as Attachment L-3of the RFP. This attachment will be used by all Offerors to document the proposed Socioeconomic Commitment as required in Paragraph L.5.2. Attachment L-3 will be compared to the Offeror's cost proposal for the Sample Task Order for consistency. In the case of minor errors or omissions that do not affect the other areas of the proposal, and may be corrected with minor clarification, the Offeror may be contacted by the Contracting Officer for immediate clarification.

In the case that an Offeror meets the criteria as specified in paragraph L.5.2 and through discussions

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provides a Final Proposal Revision (FPR), the criteria for paragraph L.5.2 must be met and the Offeror must resubmit the SB calculation Attachment L-3.

L.5.3 SMALL BUSINESS SUBCONTRACTING PAST PERFORMANCE (SUBFACTOR B)

Offerors shall submit 1-3 subcontracting reports (Individual or Summary Subcontracting Reports) or DCMA audits of subcontracting plans for their recent contracts that required a subcontracting plan. For the purposes of evaluation, recent subcontracts are those performed in the past five (5) years. The Government will evaluate for compliance with FAR 52.219-8 and 52.219-9. Subcontracting reports do not count in the page count. Offerors who do not have subcontracting past performance shall indicate so on the L-3 Form, Socioeconomic Commitment.

L.6.0 VOLUME V – COST

L.6.1 GENERAL

The cost proposal should be prepared simply and economically, providing straightforward, concise delineation of proposed cost to satisfactorily perform DTRA's requirements as proposed within the offerors technical volume. . These instructions are to assist the Offeror in submitting data other than certified cost or pricing data that is required to evaluate the reasonableness, realism, and completeness of the proposed costs. Compliance with these instructions is mandatory and failure to comply may render the Offeror's proposal ineligible for award. The burden of proof of credibility of proposed costs and prices rests with the Offeror. All cost information shall be addressed ONLY in the Cost Volume (Volume V). The Government reserves the right to not consider/evaluate material of a technical nature that is included only in Volume V Cost.

Offers should be sufficiently detailed to demonstrate their reasonableness. The offeror shall describe in detail their approach to accurately projecting and managing costs in a dynamic environment to include: their in-depth methodology for projecting event costs and burn rates, how they will manage changes in cost and or un-expected impacts, and how they will maintain a constant line of communication with the COR and Program Management Team. The Offeror shall provide a Cost Plus Fixed Fee proposal for each sample Task Order.

The Offeror shall provide information required by FAR provision 52.222-46, Evaluation of Compensation for Professional Employees, and submit within the Cost Volume.

Data beyond that required by this instruction shall not be submitted unless the Offeror considers it essential to document or support the cost position. All information relating to the proposed cost and price, including the required supporting documentation must be included in the section of the proposal designated as the Cost Volume (Volume V). Under no circumstances shall this information and documentation be included elsewhere in the proposal (except for the quantitative estimates on cost in Table 3.3.3: Proposal Risk Matrix, in Section L.3.3.3 and the items required by Section L.5.2).

In accordance with FAR 15.403-1(b) and 15.403-3(a) and as detailed below, data other than certified cost or pricing data is required. However, if after receipt of proposals it is determined that adequate price competition does not exist, certified cost or pricing data may be required (reference FAR 15.403-4). The Offeror shall provide current, complete, and accurate cost or pricing data within the calendar days specified in the Contracting Officer's request.

L.6.2 VOLUME ORGANIZATION

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Volume V shall be organized according to the following outline:

a. Table of Contents
b. Glossary
c. Sample Task Order
    1. Cost Narrative
    2. Cost or pricing information and supporting data, to include estimating methodology

L.6.3 COST NARRATIVE

L.6.3.1 Assumptions

A cost proposal is presumed to represent an Offeror's best effort to respond to the solicitation. Any inconsistency, whether real or apparent, between promised performances and cost, shall be explained in the cost narrative. For example, if the intended use of new and innovative techniques is the basis for an abnormally low estimate, the nature of these techniques and their impact on cost should be explained. Any significant inconsistency, if unexplained, which raises a concern on the fundamental understanding of the nature and scope of the work required may be grounds for rejection of the proposal or grounds for adjusting the probable cost. The burden of proof as to cost-credibility rests with the Offeror.

L.6.3.3 Contractor Systems

The cost narrative shall include information for the prime contractor, joint venture partner, and any subcontractor/teaming members (this requirement is for sample task order participants only) on the following contractor systems. The Offeror must have adequate estimating, purchasing, and cost accounting systems (i.e. must be a DCMA/DCAA approved cost accounting system).

L.6.3.3.1 Estimating System

Provide a summary description of the Offeror's standard estimating system or methods. The summary description shall cover separately each major cost element (e.g., Direct Material, Direct Labor, Indirect Costs, Other Direct Costs, Overhead, G&A, etc.). Offerors are not required to show actual percentages and/or formulas detailing the actual build of rates from direct labor through burdens (rate buildup). However, include the rate that is being applied to each cost element. Also, include the base the rate is being applied to for each cost element. Also identify any deviations from the standard estimating procedures used in preparing this proposal or future task order proposals under this contract. Indicate if the Offeror has Government approval of its system and if so, provide evidence of such approval. Offerors shall identify the basis of proposed rates (e.g., Forward Pricing Rate Agreement (FPRA) and date of agreement, Forward Pricing Rate Proposal and date of submission, Forward Pricing Rate Recommendation and date approved, bidding rates and the date of submission, actual rates used and the effective date, provisional billing rates and the date of approval, etc.), and provide copies of FPRA/FPRPs/FPRAs utilized in the proposal.

L.6.3.3.2 Purchasing System

Provide a summary description of the Offeror's purchasing system or methods (e.g., how material requirements are determined, how sources are selected, when firm quotes are obtained, what provision is made to ensure quantity and other discounts). Also identify any deviations from its standard procedures in preparing this or future task order proposals under the contract. Indicate if the Offeror has Government approval of its system and if so, provide evidence of such approval.

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L.6.3.3.3 Accounting System

Indicate whether the Offeror has Government approval of its system and if so, provide evidence of such approval. Also, identify any deviations from the Offeror's standard procedures in preparing this and future task order proposals under this contract. The offeror shall provide the following information:

- DCAA point of contact with a current email address or phone number
- DCAA/DCMA approved Forward Pricing Rate Agreement/Recommendation
- DCAA/DCMA determination that the contractor's accounting system is adequate for determining costs applicable to cost-reimbursable awards

L.6.4 COST OR PRICING INFORMATION AND SUPPORTING DOCUMENTATION

The Offeror shall provide a detailed cost proposal for accomplishing the requirements of the Sample Task Orders that is consistent with the technical and management approaches provided in Volume II. The cost proposal shall delineate labor hours, labor categories, indirect costs, (to include base and percentage used in calculation), other direct costs, G&A, and fee for both prime and subcontractors. Dollar amounts for totals shall be rounded to the nearest dollar. Items such as labor rates or unit rates (e.g., unit rates for material) shall be rounded to the nearest penny. If proposed direct labor for a current employee is based on other than actual current payroll data, the Offeror shall explain/support the discrepancy in its proposal and the basis for estimation. For new/contingent hires, the proposed direct labor rate shall be supported by an explanation of how the projected labor cost was derived. If direct labor composite rates are used, provide the calculations used in deriving the composite rates. The offeror shall identify all uncompensated labor (straight time and/or overtime) included and explains the impact of uncompensated time on the direct rates proposed. Explain the number of hours used to calculate the Offeror's full-time man-year. The Sample Task Orders shall be priced by Base period and Option period, as appropriate. The contractor shall provide a spreadsheet for work at the Contract Line Item Number (CLIN) and summary levels. The Cost Excel workbook shall include a summary tab with a roll up of all costs. All costs shall be rounded to two decimal points and worksheet shall be unlocked with all formulas present.

If subcontractors are utilized, the Offeror shall provide the results of the analysis conducted by the Offeror (prime contractor) establishing reasonableness of proposed subcontract prices (reference FAR 15.404-3(b) and (c)). The Offeror is expected to evaluate its subcontractor costs to establish how it finds these costs to be fair and reasonable and to provide adequate documentation to the Contracting Officer in support of this. If the Contracting Officer requires further data to verify that this is adequately established, then the Offeror will be required to provide additional information such as subcontractor's [other than] cost or pricing data. Offerors shall identify any subcontractors that are accomplishing more than 10% of the total cost and identify task(s) to be performed by the subcontractor, the type of subcontract, and value of the subcontract. Subcontractors can send their fully disclosed pricing directly to DTRA as instructed in Section L.1.3.7. Sealed subcontractor /team member proposals are due at the same time as the Prime Offeror's. Documenting that award of subcontracts will be in accordance with FAR clause 52.244-5, Competition in Subcontracting (DEC 1996).

The Offeror (and proposed subcontractors) shall provide the information required by FAR provision 52.215-22 and submit in Volume V.

L.6.5 PROFIT OR FEE

Offerors shall include their proposed fee (dollar amount and percentage) for the Sample Task Order, and shall specify the base upon which the fee percentage is applied. Per DTRA Clause 252.216-9005, there

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will be no profit or fee on travel. Profit or fee on future task orders will be negotiated at the task order level. Profit or fee rates will depend on the complexity of the specific requirement and the attendant performance risk, contract type risk, and/or facilities capital employed.

L.6.6 SAMPLE TASK ORDER PRICING ASSUMPTIONS

Sample Task Orders are Cost Plus Fixed Fee (CPFF). The Sample Task Order (Attachment L-4 for Program Execution, L-5 for Facility) contains information on period of performance, place of performance, and specific pricing assumptions.

End of Section L

Section L Attachments:
L-1: Present and Past Performance Information Form
L-2: Present and Past Performance Questionnaire
L-3: Socioeconomic Commitment Calculation Template
L-4: Sample Task Order Program Execution FY25 Requirements
L-5: Sample Task Order for Facility

Section M – Evaluation for Award

M.1.0 BASIS FOR CONTRACT AWARD

M.1.1 GENERAL CONSIDERATIONS

In addition to the evaluation of the specific factors identified in M.3.0, the Government will consider compliance with the solicitation terms and conditions and the status of contractor and teaming members' estimating, purchasing and accounting systems (the Offeror must have an adequate cost accounting system; if a subcontractor does not have an adequate accounting system, it will not reflect negatively on the Prime contractor's evaluation as such a subcontractor could be awarded a subcontracted task order under a contract type that does not require an approved cost accounting system, such as Firm Fixed Price). These general considerations do not receive a color rating, but will be considered by the source selection authority in making the best value decision.

M.1.1.1 Department of Defense (DD) Form 254 Security Requirements

The Government will also consider the Offeror's facility security clearances as part of general considerations because security requirements on Task Orders can go as high as Secret. At the IDIQ level, the Prime Offeror will be required to hold a Secret facility clearance. This does not preclude having personnel that are working unclassified portions of work (e.g., university subcontractors). A contractor is eligible for a prime award only if it is compliant with the requirements of the IDIQ DD-254 by the projected award date per the instructions in Section L.2.7.

M.1.1.2 Organizational Conflicts of Interest

Pre-award Organizational Conflicts of Interest and the Organizational Conflicts of Interest Mitigation Plan will not be treated like a separate evaluation factor, but are part of these general considerations. They will be reviewed in accordance with Section L.2.11.

M.1.1.3 Small Business Subcontracting Plan

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In accordance with FAR 19.704 and DFARS 219.704, other than small business Offerors shall submit a small business subcontracting plan in accordance with FAR 52.219-9 and DFARS 252.219-7003 (or DFARS 252.219-7004 if the Offeror has a comprehensive subcontracting plan). The small business subcontracting plan is a requirement for award to a Large Business and will be incorporated into any resultant contract. The small business subcontracting plan, though not evaluated for source selection purposes, will be assessed in accordance with FAR 19.704, and must be deemed acceptable prior to award. Note: Any exchanges with the Contracting Officer regarding the small business subcontracting plan shall not be considered discussions. The Small Business Subcontracting Plan is for the IDIQ level, not the sample Task Order. The subcontracting plan, when submitted, shall be expressed in terms of both percentage of subcontracted dollars AND percentage of total contract value for the entire IDIQ contract. Minimum acceptable goals, in terms of Total Subcontracted Value are:

Small Business (SB): 12%
Small Disadvantaged Business (SDB): 1%
Women-Owned Small Business (WOSB): 1%
Veteran-Owned Small Business (VOSB): 2%
Service-Disabled Veteran-Owned Small Business: 2%
Historically Underutilized Business Zone (HUBZone): 0.4%

The subcontracting plan is not required at proposal submittal. The Government will request subcontracting plans from apparent successful offerors before contract award.

M.1.2 NUMBER OF CONTRACTS TO BE AWARDED

The Government intends to award a single IDIQ contract under full and open competition. The Government also intends to award the Sample Task Orders concurrent to contract award.

M.2.0 EVALUATION PROCESS

M.2.1 EVALUATION OF PROPOSALS

The Government will evaluate fully, carefully, and impartially all (except those deemed as unrealistic in accordance with Paragraph M.1.5) responsive proposals received in response to this RFP in accordance with the evaluation factors and subfactors outlined in Paragraph M.2.0.

M.2.2 BEST VALUE DECISION

The Government will select the best overall offer based on a comparative assessment of the proposals against all source selection criteria: Mission Capability (separately assessed through three subfactors), Past Performance, Socioeconomic Commitment (separately assessed through two subfactors) and Cost. This is a best value source selection acquisition conducted in accordance with the Federal Acquisition Regulation (FAR) and Defense FAR Supplement (DFARS), and DoD Source Selection Procedures. The contract will be awarded to the Offeror who is deemed responsible in accordance with the FAR, whose proposal conforms to the solicitation requirements (including all stated terms, conditions, representations, certifications, and all other information required by Section L of this solicitation), and is judged, based on the evaluation factors and subfactors, to represent the best value to the Government, considering both cost and non-cost factors. This may result in an award to a higher-priced Offeror where the decision is consistent with the evaluation factors and the Source Selection Authority (SSA) reasonably determines that the proposal represents the best value to the Government. While the Government source selection evaluation team and the SSA will strive for maximum objectivity, the source selection process, by its

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nature, is subjective and therefore professional judgment is implicit throughout the entire process.

M.2.3 AWARD WITHOUT DISCUSSIONS

The Government intends to award this effort based on the initial proposal, as received, without discussions (except clarifications as described in FAR 15.306(a)), although the Government reserves the right to hold discussions if deemed necessary by the Contracting Officer. Each Offeror should submit its best proposal as the opportunity to submit a revised proposal is not anticipated.

M.2.4 DISCUSSIONS/COMPETITIVE RANGE

While the Government intends to award without discussions at both the IDIQ and initial task order levels, the Government reserves the right to conduct discussions if the Contracting Officer determines them to be necessary. If, during the evaluation period, it is determined to be in the best interest of the Government to hold discussions, these discussions will be held with only those Offerors determined by the Contracting Officer, with approval of the SSA, to be in the competitive range. The competitive range will be established in accordance with FAR 15.306(c)-(d) and the solicitation. The Contracting Officer may determine that the number of most highly rated proposals that might otherwise be included in the competitive range exceeds the number at which an efficient competition can be conducted and may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals. In addition, the Contracting Officer may also eliminate from the competitive range, Offerors originally determined to be in competitive range based on results of written or oral discussions if those Offerors no longer have reasonable chances of being selected for award.

M.2.5 REJECTION OF UNREALISTIC OFFERS

The Government will consider throughout the evaluation the "correction potential" of any deficiency or proposal weakness. The judgment of such "correction potential" is within the sole discretion of the Government. If an aspect of an Offeror's proposal does not meet the Government's requirements and is not considered correctable, the Offeror may be eliminated from the competitive.

M.2.7 PRE-AWARD SURVEY

The Government may conduct a pre-award survey (PAS) as part of the source selection. Results of the pre-award survey (if conducted) will be evaluated to determine each Offeror's capability to meet the requirements of the solicitation. The Government may also perform a financial capability analysis to verify that the Offeror has the necessary financial resources to perform the effort through the life of the contract.

M.3.0 EVALUATION FACTORS

A Government team will assess all responsive proposals against the solicitation requirements and criteria defined by the evaluation factors and subfactors below. In addition to the evaluation of the specific factors identified below, the Government will consider compliance with the solicitation terms and conditions and the status of contractor and teaming members estimating, purchasing and accounting systems. General considerations do not receive a color rating or proposal risk rating but may be considered by the Government in making the best value decision. Offerors are reminded that if they fail to meet the mandatory requirements for Small Business utilization in their initial proposal submission or final proposal revision, if applicable, the proposal will not be evaluated and not considered for award. See

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L.5.2.

The contract award will be made to the Offeror proposing the best value to the Government based upon comparative assessment of the evaluation factors and subfactors described below. Four factors will be used in this evaluation:

Factor 1 – Mission Capability
- Subfactor A: Management Approach
- Subfactor B: Technical Approach
- Subfactor C: Sample Task Order

Factor 2 – Past Performance

Factor 3 – Socioeconomic Commitment
- Subfactor A: Small Business Participation
- Subfactor B: Small Business Subcontracting Past Performance

Factor 4 – Cost/Price

M.3.1 RELATIVE ORDER OF IMPORTANCE

In making the best value decision, the SSA will consider the following order of importance:

In compliance with FAR 15.304(d), Factor 1 (Mission Capability) is more important than Factor 2 (Past Performance). Factor 2 is more important than Factor 3 (Socioeconomic Commitment). Factor 3 (Socioeconomic Commitment) is more important than Factor 4 (Cost/Price) Within Factor 1 (Mission Capability) all subfactors are of equal importance.

In accordance with FAR 15.304(e), when combined, Factors 1 (Mission Capability), 2 (Past Performance), and 3 (Socioeconomic Commitment) are significantly more important than Factor 4 (Cost). However, Factor 4 (Cost) will be carefully considered in the selection decision.

M.3.2 FACTOR 1 – MISSION CAPABILITY

The Government will evaluate the Mission Capability factor based on each subfactor. The Mission Capability Factor will be assigned a color rating based on the subfactor evaluations. The Government will identify and assess the strengths, weaknesses, and deficiencies of the proposed approach in relation to the identified subfactors. The Government will not assess risk separately or assign a separate risk rating.

The following definitions will be utilized in the evaluation of the Management, Technical Approach, and Sample Task Order subfactors:

- **Significant Strength** - An aspect of the Offeror's proposal that appreciably enhances the merit of the proposal or appreciably increases the probability of successful contract performance.

- **Strength** - An aspect of the Offeror's proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during contract performance.

- **Weakness** - A flaw in the proposal that increases the risk of unsuccessful contract performance.

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- **Significant Weakness** - A flaw in the Offeror's proposal that appreciably increases the risk of unsuccessful contract performance

- **Deficiency -** A material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance

Subfactors A, B, and C will individually receive one of the following color ratings, with supporting narrative explanations, based on the assessed significant strengths, strengths, weaknesses, significant weaknesses, and deficiencies of each Offeror's proposals. When using these evaluation strengths and weaknesses to assign color ratings to the evaluation factors, the evaluators will exercise subjective technical judgement to determine the extent that the cumulative impacts of strengths and weaknesses in any evaluation factor may or may not be offsetting.

Table M.3.2 Evaluation Factor Ratings Table and Definitions

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal demonstrates an exceptional approach and understanding of the requirements, contains multiple strengths and/or at least one significant strength, and risk of unsuccessful performance is low.
Purple	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength, and risk of unsuccessful performance is low to moderate.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements, and/or risk of unsuccessful performance is high.
Red	Unacceptable	Proposal does not meet requirements of the solicitation, and thus, contains one or more deficiencies and is unawardable, and/or risk of unsuccessful performance is unacceptable.

M.3.2.1 Subfactor A – Management Approach

The Government will evaluate whether the Offeror has provided a detailed description of its processes and techniques to enable it to effectively and efficiently perform the tasks specified in the IDIQ SOO. The Government will evaluate proposals based on the following areas:

- If the Offeror provided a detailed comprehensive narrative that demonstrates a sound technical understanding of, and ability to perform, all SOO requirements.
- The suitability and completeness of the Offeror's organizational structure approach.
- The effectiveness of the Offeror's quality assurance approach.
- The feasibility and timeliness of the Offeror's approach to execute multiple TOs simultaneously.
- The realism, and planned results of the Offeror's proposed subcontractor team.

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M.3.2.2 Subfactor B – Technical Approach

The Government will evaluate whether the Offeror has provided a detailed description of its processes and techniques to enable it to effectively and efficiently perform the tasks specified in the IDIQ SOO. The Government will evaluate proposals based on the following areas:

- If the Offeror provided a detailed comprehensive narrative that demonstrates a sound technical understanding of, and ability to perform, all SOO requirements.
- The Government will evaluate the Offeror's understanding of the risks associated with the project and the effectiveness of their mitigation strategies.
- Government will assess whether the Offeror has the appropriate quantity of personnel, organizational structure, and skillsets to oversee and execute tasks in the SOO.

M.3.2.3 Subfactor C – Sample Task Orders

The Government will evaluate whether the Offeror has provided a detailed description of its processes and techniques to enable it to effectively and efficiently perform the tasks specified in each of the sample TO's PWS. The Government will evaluate proposals based on the following areas:

- If the Offeror provided a detailed comprehensive narrative that demonstrates a sound technical understanding of, and ability to perform, all PWS requirements.
- The Government will evaluate the Offeror's understanding of the risks associated with the project and the effectiveness of their mitigation strategies.
- Government will assess whether the Offeror has the appropriate quantity of personnel, organizational structure, and skillsets to oversee and execute tasks in the PWS.

M.3.3 FACTOR 2 – PAST PERFORMANCE

Under this factor, the Government will evaluate the Offeror's relevant present and past performance history to draw an overall conclusion of performance confidence assessment of the Offeror's ability to successfully perform as proposed. In accordance with FAR 15.305(a)(2), the currency and relevance of the information, source of the information, context of the data, and general trends in the Offeror's performance shall be considered. When combined, these elements will be used to establish one Performance Confidence Assessment rating.

The first aspect is to evaluate the recency of the offeror's past performance. In determining recency, the Government shall consider past performance references within the past five (5) years.

The second aspect is to evaluate the Offeror's past performance to determine how relevant a project is to the effort required by this solicitation. In determining relevance, consideration will be given to projects similar to this solicitation in scope, magnitude and complexity (including integration requirements and task order/subcontract management) to the range of scope areas and services required by the provided PWS.

- For scope, each referenced effort will be compared to the requirements of this effort as found in the PWS.
- For magnitude, the cost for each referenced effort will be compared to the desired baseline of at least $10 Million per year; greater emphasis will be placed on this baseline for the prime than for individual subcontractor projects.
- For complexity, each referenced effort will be compared to the requirements of this effort relative to the unique mission requirements as referenced by the SOO. In addition, the prime's complexity

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determination will consider integration and coordination experience, contract/subcontract management, ability to provide diverse skillsets to support each scope area, and adherence to demanding cost and schedule parameters.

The Government may consider efforts performed for agencies of the federal, state, or local governments and commercial customers. For subcontractors, the relevancy determination will focus on the present and past performance work history as it relates to the specific scope of work the subcontractor is proposed to do for this effort. For the prime contractor, the relevancy determination will include comparison to the entire scope of effort for this solicitation regardless of whether the prime or a subcontractor is proposed to do the work. The Government intends to use CPARS as a primary source of information validation, but reserves the right to use information in its evaluation drawn from sources beyond that provided by the Offeror, for example, evaluator knowledge of the Offeror, or information on-hand within the agency.

The definitions of relevancy are as follows:

RATING	DEFINITION
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

The third aspect of the past performance evaluation is to determine how well the Offeror performed on previous efforts. Where the relevant performance record indicates performance problems, the Government will consider the number and severity of the problems and the appropriateness and effectiveness of any corrective actions taken (not just planned or promised). The Government reserves the right independently validate statements provided in past performance references.

To arrive at an overall performance confidence assessment, the evaluation team will consider:

- The combination of the recency, relevancy and quality of work
- The context of the role on the project (i.e., previous performance as prime contractor or Subcontractor) in relation to the proposed role on this effort.
- The percentage of effort the prime and Subcontractor(s) are contributing to the effort.
- The "whole picture" that the individual Past Performance Information forms (Attachment 6), collected Questionnaires and other past performance information used by the Government, collectively provides.

Offerors that do not possess a record of relevant performance or for whom information on present and past performance is not available will not be evaluated favorably or unfavorably for Past Performance. Such Offerors will receive a "Neutral" rating to signify an "Unknown" confidence rating for the Past Performance factor.

A strong record of recent and relevant performance will be considered more advantageous to the Government than a "Neutral/Unknown Confidence" rating. Recent and Relevant performance at the Subcontractor level also will have a greater impact on the performance confidence assessment than no record of relevant performance. Likewise, more recent and more relevant performance will have a greater impact on the Performance Confidence Assessment than a less recent or less relevant effort. The less

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relevant a contract is determined to be, the less impact the performance associated with that contract may have on the overall performance confidence assessment.

Each Offeror will receive one of the ratings described below:

RATING	DEFINITION
SUBSTANTIAL CONFIDENCE	Based on the Offeror's recent/relevant performance record, the Government has a high expectation that the Offeror will be able to successfully perform the required effort.
SATISFACTORY CONFIDENCE	Based on the Offeror's recent/relevant performance record, the Government has a reasonable expectation that the Offeror will be able to successfully perform the required effort.
LIMITED CONFIDENCE	Based on the Offeror's recent/relevant performance record, the Government has a low expectation that the Offeror will be able to successfully perform the required effort.
NO CONFIDENCE	Based on the Offeror's recent/relevant performance record, the Government has no expectation that the Offeror will be able to successfully perform the required effort.
NEUTRAL CONFIDENCE	No recent/relevant performance record is available, or the Offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned.

M.3.4 FACTOR 3 – SOCIOECONOMIC COMMITMENT

Subfactor A – Small Business Participation

This subfactor evaluates the Offeror's commitment to small business and shall be rated in accordance with the chart below:

Evaluation Factor Combined Ratings Table and Definitions:

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal indicates an exceptional approach and understanding of the small business objectives.
Purple	Good	Proposal indicates a thorough approach and understanding of the small business objectives.
Green	Acceptable	Proposal indicates an adequate approach and understanding of the small business objectives.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the small business objectives.
Red	Unacceptable	Proposal does not meet small business objectives.

The mandatory Small Business participation goal is 12% of the total price of the Total Contract Value of the Sample Task Order. Offeror's socio-economic commitment will be evaluated relative to meeting the mandatory 12% Small Business subcontracting goal and the socioeconomic goals in Section L.5.2. Offeror's proposal will be evaluated for commitment to small business, as evidenced by signed teaming agreements, Mentor-Protégé Agreements and/or letters of commitment; identifying the type of work and complexity of the work subcontracted; and percentage of total contract value subcontracted to small businesses in all socioeconomic categories.

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Offerors will be evaluated based on identifying the subcontractor by name and upon having teaming agreements with subcontractors, with named subcontractors and signed teaming agreements more highly weighted than just mentioning the socioeconomic status of the subcontractor. Offerors who are involved in Mentor-Protégé Programs demonstrate more commitment to small business and will be more highly rated. Additionally offerors will be rated on the compliance, realism, and planned results of the offeror's Socio Economic Utilization Plan.

Subfactor B – Small Business Subcontracting Past Performance:

This subfactor evaluates the Offeror's present and past performance history of compliance with FAR 52.219-8, Utilization of Small Businesses and FAR 52.219-9, Subcontracting Plan. The Small Business Subcontracting Past Performance evaluation is to determine the confidence that the Government has that the offeror will meet small business subcontracting goals based on a review of the past performance of meeting goals. Each Offeror will receive one of the ratings described below:

RATING	DEFINITION
ACCEPTABLE	Based on the Offeror's performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort, or the offeror's performance record is unknown (*see note below).
UNACCEPTABLE	Based on the Offeror's performance record, the Government does not have a reasonable expectation that the offeror will successfully perform the required effort.

* Offerors that do not possess a record of past performance or for whom information on past performance is not available or so sparse that no meaningful past performance rating can be reasonably assigned, the offeror may not be evaluated favorably or unfavorably for past performance. Therefore, the Offeror shall be determined to have an unknown (or "neutral") past performance. In the context of acceptability/unacceptability, a neutral assessment shall result in an "acceptable" rating.

The Government reserves the right to examine other subcontracting reports or DCAA subcontracting audits, or Contractor Performance Assessment Reports (CPARS), in addition to those submitted with the proposal, to evaluate Small Business Subcontracting Past Performance. This subfactor will evaluate subcontracting past performance in the aggregate of all proposal submittals and other Government sources that document small business subcontracting past performance such as those mentioned above.

M.3.5 FACTOR 4 – COST/PRICE

The Government will not rate or score cost but will evaluate each Offeror's cost proposal for realism, reasonableness, and completeness. For evaluation purposes, the Government will determine the most probable cost for the Sample Task Orders by adjusting the Offeror's proposed cost and fee, when appropriate, to reflect any additions or reductions in cost elements to realistic levels based on the results of the cost realism analysis. The probable cost may differ from the proposed cost and will reflect the Government's best estimate of the cost of any contract that is most likely to result from the Offeror's proposal. The most probable cost for the Sample Task Orders will be used to determine the best value to the Government.

The Government will evaluate the realism of the proposed cost/price by assessing whether the proposed cost elements for the Sample Task Orders are realistic for the work to be performed; reflects a clear understanding of the requirements; and are consistent with the unique methods of performance and materials described in the Offeror's technical approach.

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The Government will evaluate the reasonableness of the proposed cost/price using one or more of the cost/price analysis techniques defined in FAR 15.404. In evaluating reasonableness, the Government will determine if the Offeror's proposed costs and fee for the Sample Task Orders, in nature and amount, do not exceed those which would be incurred by a prudent company in the conduct of competitive business. The Government will evaluate the completeness of each Offeror's cost proposal by assessing whether the Offeror provides the required cost data in sufficient detail to fully support the offer and permit the Government to evaluate the proposal thoroughly.

As a result of the realism analysis the Government may adjust the Offeror's proposed costs in accordance with FAR 15.404-1(d)(2), where appropriate, to reflect the Government's best estimate of the cost most likely to result from the Offeror's proposal. The resulting "Most Probable Cost" will be used for evaluation purposes to determine best value to the Government. The Government reserves the right to not award this task order to a contractor whose cost and total price is unrealistic.

M.4.0 TASK ORDER AWARD

M.4.1 GENERAL

The Government intends to conduct a Task Order competition (Task Order award) for each Sample Task Order. This Task Order award process may take place in conjunction with or following Offeror selection for IDIQ award (or IDIQ contracts awarded) in accordance with M.2.0 above. The Task Order award is a separate process from the source selection of the base IDIQ; however, as described in M.4.2 and M.4.3 below, the Task Order award will utilize information submitted and evaluations conducted in support of the overall IDIQ source selection.

M.4.2 AWARD PROCESS FOR TASK ORDER AWARDS

The Government will not issue a separate RFP, but will utilize information submitted in response to the IDIQ RFP. The award criteria shall be as detailed in M.4.3.

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